BC**PROGRESS**BOARD

THE ROLE OF INTERNATIONAL EDUCATION: EXPANDING STUDENT OPPORTUNITY AND ECONOMIC DEVELOPMENT IN BRITISH COLUMBIA

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for the

BC Progress Board

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EXECUTIVE SUMMARY

The BC Progress Board, established by Premier Gordon Campbell in July 2001, is an independent panel of 18 senior business and academic leaders. The Board benchmarks British Columbia's economic and social performance against other jurisdictions and tracks the province's performance over time. The Board also provides strategic advice to the Premier and the Government on ways to improve the economy and provincial social policy supports.

The education sector of British Columbia accounts for close to 30 percent of the provincial budget and employs over 130,000. At the same time, private and public sector education providers have significantly increased activity in the area of international education over the past two decades. Public and private sector organizations export educational products and services overseas and provide a wide range of education and training to international students studying here in British Columbia.

BC's public and private education sector has been able to attract about 150,000 international students each year. In addition, the province's colleges, university colleges, universities, the British Columbia Institute of Technology (BCIT), and the Ministry of Education have established teaching and research partnerships overseas and frequently deliver contract and consulting services to international clients. Annually, the education sector is responsible for generating more than $2 billion from its international education activities. Approximately one-third of this revenue flows directly to the education organizations as tuition, while the balance is spent by international students on housing, food, and leisure activities.

UNESCO estimates that, worldwide, there are currently two million students studying outside their home countries, a number that it expects will grow to five million by 2020. It follows that there is potential for British Columbia to attract increasing numbers of overseas students to study in the province. In addition, enhancing efforts to market, promote and sell our education services abroad will further increase the international profile of the province. This will assist the Government's broader strategy of increasing trade, especially with India and China – two countries slated to become the world's largest economic powerhouses in the next decade.

While both public and private sector education providers have been relatively successful over the past decade in attracting overseas students to British Columbia, the marketplace is becoming increasingly competitive. On the international stage, British Columbia's education providers come up against highly effective, coordinated, and government supported marketing and promotion campaigns from the United Kingdom, Australia, and

New Zealand. Similarly, Ontario and Quebec's education providers have adopted a coordinated approach to marketing and promotion in the international arena, again with government support. In contrast, marketing and promotion in British Columbia's international education sector is carried out, for the most part, by individual organizations. As a consequence, the province presents a confused and uncoordinated image to the marketplace. It is unlikely, given the increasingly competitive nature of the field, that the current uncoordinated and piecemeal approach will ensure British Columbia's current market share will remain stable and not decline. This suggests that mechanisms need to be created that bring about a greater degree of cooperation and coordination between the various education providers and the Government of British Columbia. However, such mechanisms should strive to ensure that the entrepreneurial activities of the various education organizations are not restricted or impeded in any way.

The development of the international education sector has considerable potential to assist in the general economic development of the province. For example, regional economic development could be enhanced by increasing international student enrolments outside of the Greater Vancouver and Victoria metropolitan areas. In addition, provided that the Federal Government's visa regulations can be adjusted, the pending shortage of skilled workers in the province could be alleviated by tapping into the pool of skilled, English-speaking international students – a group of potential immigrants already familiar with Canadian culture. Over the longer term, increased opportunities for domestic students to engage in study abroad or overseas cooperative education placements would begin to build the kinds of global competencies in the province's workforce that are critical for success in an internationally integrated economy. Finally, BC's international education efforts are instrumental in building the kinds of personal relationships that are critical for success in an interconnected globalized economy in which 'know who' is as important as 'know how'.

The education sector faces a challenge common to many trade-dependent sectors in the province: in order to prosper there is a need to create and maintain a 'BC Brand'. While Canada and Vancouver have high international visibility, British Columbia has minimal brand recognition. Obviously, BC should be positioned as part of Canada but distinct for the purposes of certain export activities. The province has plans to use the promotion and marketing of the 2010 Olympic Games to further the global recognition of British Columbia; this may be of great assistance in positioning British Columbia internationally in the field of education.

The report suggests that the current successes in international education should be recognized and celebrated and should be used as a basis for even greater growth. In this regard, international education needs to be fully integrated into British Columbia's efforts to diversify its economy and build an internationally recognized set of trading relationships.

In conclusion, the report makes seven key policy and program suggestions to the Provincial Government. These key suggestions are augmented by forty detailed proposals to expand international education activity in the province.

The seven key policy and program suggestions are:

1) Incorporate the international education sector into the Provincial Government's integrated trade development initiatives and ensure that the sector can benefit from the development of the 'BC Brand.'

2) Consider creating an organization, modelled on Tourism BC, which can deliver effective coordination and support to the public and private international education providers.

3) Expand study abroad opportunities in order to develop a more globally literate workforce in the province.

4) Support the international education sector's role in regional economic development.

5) As a matter of high priority, address quality assurance concerns in the ESL training arena by re-regulating private sector schools and by establishing minimum teaching qualifications for both public and private sector providers.

6) Address existing visa processing challenges with the Federal Government and secure a pilot project that will assist BC in meeting the pending shortage of skilled workers.

7) Minimize policy and procedure impediments to the entrepreneurial activity of both public and private sector international education providers.

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I. PURPOSE AND SCOPE

The British Columbia Progress Board has identified the education sector as one that has the potential to generate significantly greater revenue through increased international education activity. Currently, the Government of British Columbia expends almost 30 percent of its annual budget on supporting the K-12 and post-secondary education systems in the province. In addition, a majority of the province's school districts and all of its public post-secondary institutions have been able to augment their taxpayer-supported budgets by engaging in entrepreneurial activity in the international arena. At the same time, many private sector colleges and schools have developed a focus, wholly or in part, on meeting the education, training, and English language development needs of international clients. Combined, the international activities of the province's public and private education sectors generate over $2 billion annually in revenue through tuition fees and contract revenues and through the personal spending of the 150,000 international students who study in the province each year.

The purpose of this paper is to identify the existing and potential opportunities for expansion of British Columbia's international education activities. Specifically, it will:

- review the current status of international activity in education;
- provide commentary on the opportunities or benefits available to British Columbia arising out of this activity;
- identify the challenges or obstacles that exist or may be expected; and,
- make a number of policy and program suggestions focused on strengthening the province's competitive position in the field of international education.

II. BACKGROUND

At $9 billion, the public K-12 and post-secondary education systems account for close to 30 percent of the Provincial Government's expenditures. In 2004, about 135,000 people were employed in the education sector, representing approximately 6.6 percent of the province's total employment.

Table 1: Education Expenditures (2004)	
Total Public Expenditure on Education	$9.02 billion
Education Expenditure as % of Total Provincial Government Expenditure	29.4%
Total per capita expenditure on Education	$2,084

Source: 2005 British Columbia Financial and Economic Review, Government of British Columbia

In 1980, British Columbia had minimal involvement in international education – either in the public or private sectors. Since then the industry has grown considerably and now has an estimated direct economic impact on the Provincial economy of over $2 billion per year. By contrast, the film industry delivers approximately $1 billion of direct economic

benefit to the province. About one-third of the $2 billion of revenue is derived from tuition and other fees paid by international students to public and private education institutions. The balance finds its way directly into local economies as students spend significant amounts of money on such things as accommodation, food, transportation, and entertainment. And, of course, their economic impact is further enhanced as they attract parents and other family members to the province as tourists. Clearly, the public and private education sector's success in the realm of international activity is one of the best-kept economic secrets in British Columbia.

Estimates suggest that each year British Columbia's public and private sector educational institutions host approximately 150,000 international students. These students attend courses and programs ranging in duration from a few weeks to a full academic year. Unfortunately, there is no comprehensive collection of data on the numbers of students or the nature of the programs they are attending. In addition, data is not collected on revenues generated overseas or here in BC. As a consequence, the full financial impact of this economic sector is not completely understood. With this in mind, the reader should be aware that the financial impact data provided in this document is based on estimates only; however, the estimates are conservative and therefore do not reflect the full range of activity in the sector.

With respect to private sector educational organizations, tuition and other revenues are used to cover the cost of operations and to generate profit. Public sector institutions also use the revenue to cover the cost of their international operations. The province's universities, colleges, university colleges, BCIT, and the school districts have set their tuition rates to cover all operating and capital costs and aim to generate surpluses which provide additional services and facilities for domestic students. A recent study conducted by the audit unit of the Ministry of Finance, and commissioned by the Ministry of Advanced Education, examined the question of whether or not there was taxpayer subsidization of international students at a sample of the province's post-secondary institutions. The study found that at the seven institutions examined all direct, indirect and capital costs associated with providing educational services to international students were covered and that "there was likely no subsidization of international students by BC taxpayers."

Box 1:

Malaspina University College Centre for International Education

Malaspina University College in Nanaimo enrols about 1,500 international education students each year. Net revenues derived from tuition and overseas consulting projects have enabled the institution to construct its Centre for International Education. Opened in 2003, the 3250 square metre building cost approximately $4.25 million to construct.

The Centre is used extensively by international students and by students from BC. It houses twelve classrooms, one multi-purpose room, two computer labs, a language lab, a student lounge, 37 surf/study stations, and offices and support staff stations for International Students Services, English-as-a-Second-Language faculty, and International Education.

Surpluses in the public sector are used for a wide variety of purposes including: the provision of additional capacity and choice for domestic students; provision of enhanced information technology resources; financing building projects which benefit both international and Canadian students; funding projects aimed at internationalization of the curriculum; offsetting operating deficits from domestic student operations; and operating scholarship and study abroad bursary programs. It must be stressed, however, that the majority of public institutions use any net revenue generated by their international operations to augment existing operations and generally do not use them to fund on-going base operations. This is a rational approach given the potential for sharp revenue declines brought about by health and security emergencies and political and economic shifts in the international arena.

In addition to the direct economic benefits to British Columbia, international education activities confer upon the province significant strategic advantages with respect to the development of a globally literate workforce and the cultivation of overseas personal and professional relationships. We are now embedded in a global, interlinked economy that is driven by global trade and monetary flows, multinational companies, and bilateral and multilateral trade agreements. To remain competitive and to grow in this global context, British Columbia must have a workforce that possesses the appropriate skills and a knowledge and awareness of other cultures and systems. These attributes must then be leveraged by business, industry, and government to provide competitive advantages based upon knowledge and innovation. Of profound importance in this global economic context is the role interpersonal relationships play in ensuring growth in trade and economic vibrancy. As the Conference Board has indicated, nowadays 'know who' is as important as 'know how' for business and trade. Clearly, British Columbia's growing international education sector is a key element in building relationships with current and future trading partners and, as such, needs to be recognized and nurtured.

III. CURRENT ACTIVITIES

Products and Services

Offshore Delivery

For the most part, the export of expertise and services overseas is dominated by public sector universities, university colleges, colleges, BCIT, and the Government of British Columbia itself. In this latter case, the Ministry of Education has developed a very successful relationship with privately operated secondary schools in Dalian, Liaoning province, northeast China, where some 1,700 students are enrolled in accredited programs leading to acquisition of the BC Dogwood Certificate. The Ministry provides the curriculum and quality assurance services and requires that the program be taught by BC qualified teachers. It is interesting to note that these arrangements are likely to be expanded to two new locations in China and one in Egypt in the near future, an expansion which is directly related to the confidence potential clients and governments have in the rigour of the Ministry of Education's quality assurance mechanisms.

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The province's public and private post-secondary institutions deliver a wide variety of products and services overseas. Many public institutions are involved in Canadian International Development Agency (CIDA) sponsored projects throughout the world, while others are delivering professional development and skill upgrading courses that are often sponsored by such agencies as the World Bank and the Asia Development Bank. In addition, many public post-secondary institutions have developed relationships with sister institutions overseas. These arrangements are often aimed at relationship building and focus on student and staff exchanges and the development of joint research projects. BC's institutions are also reaching out to overseas students electronically and provide a wide range of programs and courses online to overseas students.

Delivery in British Columbia

The delivery of education and training services to international students in British Columbia is dominated by traditional instructional activities. However, as BC's capabilities in such areas as health, engineering, biotechnology, forest technology, and information technology have become better known, there has been a significant increase in international consulting contracts, demonstration visits to BC institutions, and joint research activities involving BC faculty and overseas partners. These latter activities have often arisen from the personal relationships that have developed out of partnerships and linkage arrangements developed with overseas institutions and, also, as a consequence of government-to-government initiatives. Individually and collectively they hold significant promise for future economic development and diversification in the province.

Box 2:

Public Sector Educational Organizations Add Value for Domestic Students

Net revenues from international education are used in a wide variety of ways by school districts and public post-secondary institutions to benefit domestic students. School districts purchase additional computers and are able to offer a wider range of courses. Colleges, universities, and BCIT provide additional seats for domestic students and provide enriched services. At UBC and SFU for example, net revenues from international education are being used in part to expand cooperative education supports, provide bursaries for study abroad experiences for BC students, and increase student exchange opportunities. UVic uses some of its net revenue to help upwards of 700 of its students to study overseas for periods of between three and twelve months. In addition, UVic is spending some of its additional revenues on internationalization of the institution's curriculum.

Every year about 150,000 international students are enrolled in BC's public and private education institutions. Approximately 100,000 overseas students take ESL training in the province, with a majority taking classes at the province's nearly 200 private ESL schools. The remaining overseas students studying in BC take courses or programs that are more than six months in duration from private and public sector post-secondary institutions and from school districts. Over 7,000 of these students are enrolled in Grade 10, 11, and 12 classes offered by approximately two-thirds of the province's school districts. These school district programs often involve ESL instruction as a precursor to initial enrolment in the high school graduation stream. Similarly, many of the post-secondary institutions offer

comprehensive ESL training to international students seeking a Dogwood equivalency or college/university entrance.

Many of the students enrolled in ESL programs go on to enrol in degree, diploma, or certificate programs offered by the province's public and private post-secondary institutions. Usually, international students are integrated into regular programming and sit side-by-side with domestic students. Some private sector colleges, however, hold training courses specifically designed for international students in such areas as tourism and business administration. Most public post-secondary institutions prefer to maintain a mix of international and domestic students in their classes, aiming to have between five and 10 percent of their total enrolments made up of international students. BC's newest private university, University Canada West, is unique in this regard in that it has set itself a goal of 50 percent of its student body being made up of international students (although many of those will be taking courses in their home countries through online technologies).

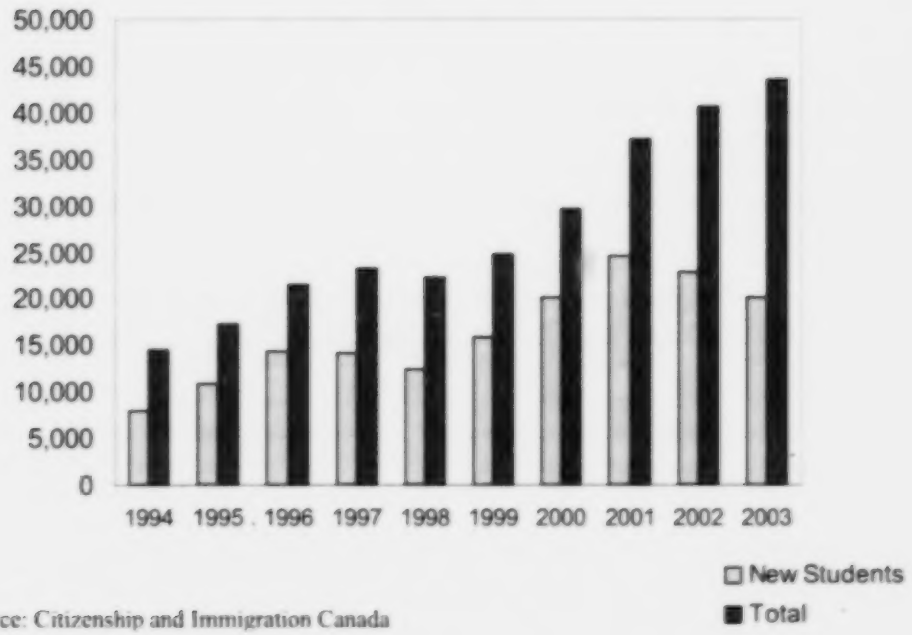
In addition to integrating overseas students into regular programs, many public post-secondary institutions are now offering specialized professional development programs designed to meet the needs of specific client groups or agencies. The duration of these kinds of programs ranges from a couple of weeks to several months, with the longer programs often offering an opportunity for the client group to improve English language skills in addition to the professional development components.

Enrolments

International student enrolments in the province fall into two categories. 'Visa students' are foreign nationals granted temporary resident visas by Citizenship and Immigration Canada (CIC) to study in courses or programs more than six months in duration or who have been granted study visas on humanitarian or compassionate grounds. 'Short-term students' are permitted into Canada as tourists and take courses or programs that are of less than six months duration.

In the 23 years from 1980 to 2003 (the latest year for which data is available) the number of visa students studying in British Columbia rose from under 3,000 to 43,400. This dramatic increase masks, however, a recent downturn in the number of new students being attracted to the province. This downturn in the recruitment of new students probably reflects the impact of security issues and the SARS outbreak. While existing students staying for longer periods of study offset the lower recruitment figures, the long term implications for BC's competitive position in the marketplace could be significant if there is not a rebound in the number of new students entering the province. If BC is unable to return to earlier levels of recruitment in the face of mounting competition we can expect to see a reduction in total enrolments as the current cohorts of students graduate. This would suggest that a more concerted and coordinated approach to marketing and promotion of BC's education sector overseas would be prudent.

Chart 1: British Columbia's Visa Students



Source: Citizenship and Immigration Canada

Economic Impact

As suggested earlier, the economic impact of the province's 150,000 overseas students is not accurately known but it is certainly considerable. Some indication of the economic impact of the short-term training market can be found in the Vancouver Economic Development Commission's (VEDC) 2003 report that examined the economic impact of ESL schools and colleges in Greater Vancouver. The report indicated that at the time of the study there were more than 170 ESL organizations (mostly private sector) operating in the Greater Vancouver area, with approximately 100 located in the Vancouver downtown core. The VEDC estimated that this activity generated $500 million each year from tuition and student housing alone. In addition, these short-term students each spent an additional $1,000 a month on leisure and travel. With each student staying an average of three months in the province, these additional expenditures were estimated to pump another $260 million into the economy each year. The total annual impact on the Greater Vancouver area of short-term ESL students is, therefore, approximately $760 million. Needless to say, this figure does not cover similar activities in communities such as Victoria, Nanaimo, Prince George, Kamloops, and Kelowna, activities that likely push the economic impact of this sub-sector up to $1 billion annually.

Expenditure patterns for the over 43,000 visa students who study in BC each year are somewhat different given their longer periods of study. Average annual tuition for

international students at public post-secondary institutions now sits at about $12,000. In addition, each student has annual housing and food costs of about $9,000 and spends approximately $10,000 per year on study and leisure related activities. With each student spending an average of $31,000 per annum the total economic impact of this sub-sector of the international education industry is some $1.34 billion.

Table 2: Estimated Annual Economic Impact of International Students on the BC Economy

Student Category	Expenditure per student	Total
Visa students	Tuition - $12,000/yr	$521 million
	Housing - $9,000/yr	$390 million
	Leisure - $10,000/yr	$434 million
Short-term students *	Tuition and Housing	$500 million
	Leisure	$260 million
	Total direct expenditures	**$2.1 billion**

*Vancouver only

Employment in the Sector

Government does not track this sector so there is no data on the total job creation record of international education in the province. However, some measure of the number of jobs created can be had from a variety of sources. The VEDC study estimates that approximately 2,000 direct jobs are created annually by the organizations involved in ESL training in the Greater Vancouver area. Of these, about 1,200 jobs result from the operations of the larger schools that are members of the Canadian Association of Language Schools (CAPLS). In the public sector, a sample survey among public post-secondary institutions conducted in 2004 by the British Columbia Centre for International Education (BCCIE) revealed that the teaching and support of international students was a significant generator of new jobs (see table on the following page).

Table 3: Employment Generated by International Education: Selected Institutions	
Institution	**FTE Employees**
Camosun College	44
Capilano College	50
Malaspina University College	68
Selkirk College	12
Simon Fraser University	58
Thompson Rivers University	75
Vancouver Community College	39

Estimates of employment in international education and non-resident student programs operated by school districts suggest that about 160 additional teachers are hired to provide instruction. As well, administrative and support staff positions are required to support the programs, and probably push employment to more than 200.

Other Benefits

As has been observed earlier, British Columbia is now embedded in a global economy in which the extent and nature of personal relationships is a key determinant of economic success. In a 1999 report, the Conference Board demonstrated the strong link that exists between levels of international education and regional and national economic well-being. In comparing Canada with nine of its most significant international trading partners, the Board found a positive relationship between each nation's level of international education activity and its Gross Domestic Product, the degree of trade in innovations, the level of international trade, and the amount of direct foreign investment in the country.

Also, many jurisdictions are recognizing the important role that international students can play in answering the emerging shortages of skilled workers. Australia, for example, now relies on international students to fill approximately 50 percent of its need for skilled immigrants. In British Columbia, increasing numbers of overseas students later become permanent residents. These individuals have the benefit of a BC education and, hence, are not faced with the barriers associated with foreign credentials that confront many immigrants. Thus, they are able to make an immediate contribution to BC's future economic development.

Box 3:

Strategic Economic Benefits of Education as an Export Industry

International education activities in the province generate a number of important strategic economic benefits, including:

- Developing internationally and inter-culturally competent graduates with the knowledge, technical and language skills and abilities needed to work and live in today's interdependent world.
- Strengthening global partnerships in industry, education, and government.
- Forging friendships between British Columbians and international students, faculty and staff that foster goodwill and understanding with future leaders around the world.
- Developing relationships overseas that can lead to business opportunities.
- Enhancing the quality of education and research through increasing the exposure of faculty to overseas developments.
- Promoting the adoption of innovation as a result of increased global information flows between individuals and the organizations they represent.

Summary of Observations

- The economic benefits associated with international education are significant in monetary terms and a planned and managed development of growth in the sector will have sustainable benefits in the future.
- The in- and outflow of students will support the development of international relationships and further business expansion in the province.
- A well-developed and sustainable international education and training sector will complement the Provincial Government's commitments to improving education in all levels and will help ensure the province's continued economic prosperity in a global economy.

IV. POTENTIAL OPPORTUNITIES

Size of the Market

During the past two or three decades, increasing numbers of students living in developed or developing countries have had the opportunity to take part of their education overseas. UNESCO has estimated that two million students are currently studying outside their home country, a number that will probably reach five million by year 2020. According to a recent study conducted by Merrill Lynch, the international education sector worldwide is a $2.2 trillion business.

Post-secondary participation rates are anticipated to increase dramatically in developing nations over the next 20 years. For example, China is expected to increase participation rates from the current four percent to 19 percent by 2020, while India is expected to double its current rate to eight percent by the same date. These growth projections are reflected in the UK's reporting of a 70 percent and 65 percent growth in enrolments from China and India respectively over a one year period (academic year 2002/03 vs. 2001/02).

In Asia alone, it is estimated that population growth will produce a demand for an additional 800,000 international university seats through to 2010.

Market Dynamics

The marketplace is not only expanding and becoming more competitive, it is also seeing inter-changing roles of host and supplier countries. Countries that used to supply students are now offering education internationally. A case in point is Singapore. Once primarily an exporter of students, Singapore has become a regional education centre. In the same region, Malaysia has successfully enrolled foreign students in their private colleges and is now competing directly with Canada, Australia and the UK for overseas students. Similarly, China is now attracting increasing numbers of students from its regional neighbours. The final decade of the last century saw significant growth in the establishment of offshore campuses by established universities, often in cooperation with local partners. As well, with the advent of the Internet there has been a rapid increase in the number and variety of distance education programs offered in the market place.

The evidence is clear: education is a sizable and growing 'export' business. To date, British Columbia has been reasonably successful in tapping into the market for onshore and offshore delivery of education and education services. While a relatively small player in the marketplace, the province has the opportunity to expand with the world market as it continues to grow over the coming decade or so. The province is particularly well placed given the recent downturn in international student enrolments in the United States, a downturn due largely to increasing concerns over security in the US. However, if BC is to retain, let alone increase, its market share, a more coordinated and focused approach by both public and private sector education providers is critical.

Box 4:

Thompson Rivers University's International Building Funded by Export Revenues

March 2005 marked the official opening of the new International Building at Thompson Rivers University (TRU). This $11.5 million, 4,650 square metre building is being paid for entirely from revenues derived from TRU's extensive education export activity. The building is used by both domestic and international students and provides nine state-of-the-art classrooms and lecture theatres, two language and two computer labs, a number of study/breakout and meeting rooms, and numerous faculty and staff offices. The building also features a wireless lounge for students and an astronomical observatory on the roof. The building has been designed to allow for easy expansion in the future.

Currently, TRU has 820 full time international students enrolled in its baccalaureate, diploma, and certificate programs in Kamloops. In addition, the University provides specialized training and language tourism services to a further 500 international clients. Overseas, there are over 1,000 students enrolled in programs offered jointly with the University's international partners.

Regional Economic Development

The international education sector also has an important role to play in regional economic development. Many school districts and post-secondary institutions outside of the Lower Mainland and Victoria metropolitan areas have spare capacity that could readily soak up international students. School districts in particular could benefit from expanding their

international education activities, particularly in the face of a continued decline in student numbers. The Ministry of Education projects that the school age population will decline by an average of over 5,000 each year through to 2013/14. By expanding international student numbers school districts would be able to keep schools open that would otherwise have to close and provide employment for teachers and staff who would otherwise have to be laid off.

With each student contributing up to $30,000 annually into the community it would make sense to promote K-12 and post-secondary international education in the smaller cities of the province. While Vancouver will always dominate the marketplace given its worldwide recognition, a well-orchestrated promotional campaign would bring about increased uptake of spare capacity in coastal, northern, and interior school districts and colleges. With a growth in the public education international sector, smaller private sector ESL colleges could well find a market in the smaller cities as feeders for college programs. Such an expansion would also bring about a greater international awareness of the potential for economic activity in the smaller cities outside of Vancouver and Victoria, over time spurring the development of business and industry in non-metropolitan areas through investment and immigration. And, at the same time, the heightened international visibility associated with such marketing and promotion efforts would lead to an inevitable rise in enrolments in the Vancouver and Victoria regions.

Source of Skilled Immigrants

By further expanding its intake of international students British Columbia has an opportunity to attract and retain the well-qualified and skilled immigrants necessary to maintain and develop the province's economic capacity in the coming decades. In particular, expansion of the number of international students in trades and technical studies could help alleviate the emerging shortage of skilled workers in the province. A coordinated effort involving institutions that offer trades training – the university colleges, BCIT, TRU – and the Industry Training Authority to recruit international students into these programs would be wise. This effort could usefully be backed up by a government supported scholarship program aimed at highly capable overseas students who would not normally be able to afford to study in British Columbia. Of course, significant immigration policy issues would have to be dealt with before such an initiative could bear fruit.

Since immigration policy lies within the Federal Government's purview, the Provincial Government will have to negotiate any changes to existing immigration law. In this context, the Australian Government's approach to tapping into its international student body as a major source of skilled immigrant workers – immigrants who already have the requisite English language skills and who are already familiar with the Australian culture – is instructive. Accordingly, the Government of British Columbia should negotiate with the Federal Government a more favourable immigration regime, one which smoothes the transition from student visa to landed immigrant status for qualified and skilled graduates.

On-line Learning

The province's post-secondary sector – both private and public – can further increase its international presence by expanding its distance delivery capacity. Larger institutions will be able to handle this kind of expansion with relative ease. The smaller colleges and universities will have some difficulty given the economies of scale necessary to develop, launch, and promote on-line learning products in the international marketplace. Nevertheless, smaller players can have a role in the international delivery of on-line learning through the operations of BC Campus.

Launched in 2002, BC Campus is a collaborative approach among BC's public post-secondary institutions that focuses on offering on-line and distance learning to students in British Columbia. Of particular note are the many university-level courses that can be accessed through BC Campus and which are offered by a wide variety of institutions through BC's world-class university transfer system. The transfer system is a significant strategic advantage in the international marketplace and could be easily harnessed to provide on-line access to first- and second-year university courses for international students in their home countries. Having established a connection with the BC system these on-line students would then be more likely to come to the province to complete their course of studies.

Developing BC Campus as a "gateway" to BC's post-secondary system would be a useful tool in the province's efforts to market and promote our education system. Moreover, it offers the opportunity of tapping into the faculty and technical resources of the province's smaller colleges and universities, thereby providing them with enhanced revenue streams and opportunities to further expand their expertise in on-line delivery.

Links with the Tourism Industry

A number of private sector and public sector international education providers in BC have been delivering ESL and activity packages for many years, often in cooperation with overseas partners. These programs, which are usually of two to four weeks duration, combine ESL instruction with such activities as sightseeing, golfing, horseback riding, whale watching and other cultural and recreational activities. It would appear there is considerable scope for both the tourism and education sectors to develop partnerships aimed at expanding language tourism packages in number, seasonal distribution, and geographic location, with the ultimate goal of having the province become a recognized and preferred destination for this category of specialized English language training experiences. Currently, Geneva and Oxford have positioned themselves as preferred destinations for education tourism by focusing on French, German, and English language skill development in conjunction with cultural and/or outdoor activities. With the development of appropriate regional partnerships between local education and tourism providers, and with the active promotion of these products through BC Tourism, BC should be able to expand these kinds of language tourism products over the coming years. Within this context, the 2010 Olympic Games present an opportunity to promote the expansion of these services into the winter months. Indeed, with appropriate marketing

there is no reason why British Columbia cannot become a significant world player in year-round language tourism.

Summary of Observations

- The opportunities to expand international education in the province are significant.

- Such expansion will directly aid economic development by bringing in new revenues and by encouraging well-educated and skilled individuals to consider emigrating to BC upon graduation. Over the longer term, significant contributions will be made to the province's economy by business and commerce activity resulting from the development of personal relationships and contacts with overseas governments, businesses, and future leaders.

- The current laissez-faire approach to international education will not deliver on the sector's full potential. Nor is it likely given the increasingly competitive nature of the field that the current uncoordinated and piecemeal approach will ensure BC's current market share will remain stable.

- The Provincial Government has an important and pressing role to play in this coordination. Given the role that sector can play in meeting the challenges of expanding and diversifying the province's economy in the context of increasing economic globalization, a more coordinated government focus is prudent.

- By recognizing the importance of international education, and integrating the sector into its overall economic strategy and planning, the government would be taking a critical step towards enhancing the international competitiveness of public and private education providers.

V. STRENGTHS

K-12 and University Transfer System

From K-12 to post-secondary, our education system is consistent and offers seamless transfer from one level to another. As a consequence, students can be assured that they will be able to find programs that will both meet their needs and help them find employment or access further education and training. Generally, the public education system, and much of the private education system, is recognized by many foreign nationals and overseas governments as being of the highest quality.

British Columbia's university transfer system allows students to transfer first- and second-year university courses seamlessly between all of its public post-secondary institutions and between some of its private post-secondary institutions and their public counterparts. With effective promotion, the university transfer system could be a major strategic advantage in the international education sector. Attractive packages could be

put together featuring one or two years of study in the province's smaller institutions followed by capstone years at a university, university college, or college. Alternatively, partnerships with overseas institutions could be developed which focus on a hybrid delivery model featuring one or two courses from the BC Campus listings offered on-line and the balance in a semester offered face-to-face by the overseas institution.

Spare Capacity in Regional Centers

In many cases, the campuses of the province's regional institutions have been struggling in recent years to operate at full capacity. While all have overseas students on their main campuses, they certainly have the capability of absorbing significantly higher numbers. Such an expansion would make a substantial contribution to local economies and would enable the institutions to provide enhanced services for domestic students. However, the budgets of regional colleges and universities are not of sufficient size to provide for international program start-up costs, nor are their operations large enough to support the marketing and promotion budgets necessary to boost enrolments of international students. Therefore, it is suggested that as part of its regional economic development strategy, the Provincial Government consider developing a marketing support program to assist smaller institutions in their efforts to boost international student enrolments.

Another suggestion is warranted in this context. Regional clusters of institutions could consider forming consortia to develop innovative program packages aimed at international students. For example, UNBC, the College of New Caledonia, Northern Lights College, and Northwest Community College could cooperate to develop university or technical programs which would see international students transferring to a different institution at the end of an academic year. These packages could be marketed on the basis of exposing students to a wide array of Canadian lifestyles. Alternatively, ESL training could be provided by one institution as a precursor to guaranteed entrance into programs at one or more of the partner institutions.

Canadian Accent

Many of BC's overseas education partners indicate that Canada is their country of choice for ESL training because it is seen as having an unaccented and easily understood form of English. This is a small but important element in BC's comparative advantage in the international education marketplace.

Cultural Diversity

Our multi-cultural and multi-lingual society offers a welcoming environment to potential education sector clients. In addition, the province's recent immigrants retain many familial and business ties with their countries of origin, ties which can be built upon to great effect, not only to expand the international education sector but also to assist with economic expansion and the diversification of markets for all of the province's products and services. However, as Dr. David Thomas, Vice President Academic at Malaspina University College, observes: "We need to build on our multi-cultural diversity in a more meaningful and coordinated way, in particular building on contacts in both India and

China as they continue to evolve as economic powerhouses. The Provincial Government must play a lead role in these efforts."

Cost Competitive Environment

British Columbia's tuition and living costs are lower than in competing countries such as the UK and the US. This advantage has been eroded recently by the increased value of the Canadian dollar. Despite this, the province remains reasonably attractive for the price sensitive client in the education sector, particularly when lifestyle, safety, and quality of educational opportunities are taken into account.

Positive International Perceptions of the Province

Canada is perceived in a very positive light internationally. It is generally recognized as a clean country with good business practices and very high quality social services, including education. Vancouver is recognized worldwide as being one of two major cities in Canada (the other being Toronto). Unfortunately, British Columbia as a province, and the various regions of the province, are not well known on the international stage. Obviously, the 2010 Winter Olympics present a unique opportunity to address this lack of broader recognition.

In the field of international education, Canada is currently enjoying a substantial competitive advantage over its usual rival the United States. Due to the additional security measures introduced by the US in recent years, many international students see Canada as a much more welcoming country for study. This is likely to be a temporary advantage and offers the opportunity for BC to generate enrolments that might previously have been lost to the US.

Obviously, the province has the opportunity to build on these positives to significantly increase the size and variety of its international education activities. However, it is suggested that in any of the Government's promotional or branding activity a strong focus is placed on the province's social structures as well as its economic attributes. The province provides good health care and has an excellent education system. In addition, BC has a safe, liveable environment and has social and political systems that are tolerant, open, and respectful of cultural diversity. These are all critical factors when it comes time for a skilled or well-educated individual to make a decision about where to emigrate. Similarly, business entrepreneurs are likely to take these positives into account when deciding on where to invest in new ventures. BC's positive social capital needs to be given prominence in any promotional activity aimed at increasing the province's visibility in the international marketplace.

Transportation and Location

As Canada's 'Pacific Gateway', British Columbia is within relatively short travel distance to Asian source countries and in particular to the emerging Pacific Rim economies. The Vancouver International Airport is a major international airline hub with

dependable routes to Asia and excellent regional connections. As such, it provides easy access to overseas education clients.

VI. CHALLENGES

Quality Assurance and Consumer Protection

The province's public education system and many of its private sector education providers have developed a well-deserved reputation overseas for the provision of high quality education. In addition, the staying power of these organizations has given comfort to students, parents, and governments alike that programs are not going to fold and result in lost tuition fees or wasted periods of study. However, some private sector organizations have provided low quality education services. Others have gone out of business, leaving students with limited educational outcomes, foregone tuition, and cancelled programs. Fortunately, private and public sector institutions in BC have stepped in to assure students of program completion when these companies have closed their doors. Nevertheless, despite these efforts, the poor quality of instruction and consumer protection found in a handful of private sector providers has had a negative impact on the overseas perception of British Columbia as a whole as a place to study.

In a highly competitive environment British Columbia can ill afford to have its reputation for quality education jeopardized by a handful of poorly operated organizations. In an effort to counter the negative fallout from business failures, the currently de-regulated private ESL education sub-sector has moved to develop self-administered quality assurance mechanisms through such organizations as the Canadian Association of Private Language Schools (CAPLS) and the Canadian Language Council (CLC). Unfortunately, a majority of private ESL school operators in BC remain outside of these organizations. Given the growing strategic importance of international education for BC's future economic well-being and the strong negative impact that results from poor performance or failure on the part of private institutions, it would seem prudent to re-regulate the sub-sector. Re-regulation will ensure that students who are enrolled in a program run by a defunct organization will have a means of recouping lost tuition. In addition, to ensure that the quality of instruction in ESL institutions – both public and private – meets minimum standards, consideration should be given to requiring all instructional staff to have an undergraduate degree and a nationally recognized minimum qualification in the teaching of English as a second language.

If the province is to emphasize educational quality in its marketing and promotional activities (and it would be wise to do so) then it may wish to establish an Education Quality Assurance (EQA) designation. Public and private sector institutions that meet established consumer protection and quality assurance standards could use the designation in their promotional activities. Modelled on the wine industry's Vintners Quality Alliance (VQA) designation, this government-sanctioned logo would provide potential overseas students and their families with the assurance that the educational organization in question had met a recognized set of standards. A list of EQA institutions

could be posted on the BC Government website (similar to lists of approved institutions found on Australian and New Zealand government websites). Institutions would have to demonstrate compliance with the EQA standards and some form of audit system would have to be in place, back-stopped by provisions for institutions to be removed from the list in the event of lapses in program quality and service standards. An EQA system would also provide a significant incentive for some institutions to improve their less than satisfactory performance.

Regional Concentration

Currently, the bulk of international students are to be found in the Vancouver and Greater Victoria areas. However, in the post-secondary sector, two non-metropolitan institutions – Malaspina University College and Thomson Rivers University – have been particularly successful in building vibrant international education operations. In addition, the University College of the Fraser Valley has significant international student enrolments. Their success suggests that with effective and sustained promotion international students can be attracted in significant numbers to areas outside of Vancouver and Victoria.

It is clear that for the short- and long-term regional economic advantages to begin to flow to the province's smaller communities some degree of Provincial Government support is needed to non-metropolitan public sector education providers. Such support might be provided in four ways:

- First, school districts, colleges, university colleges and universities in question could to be showcased in any overall Provincial Government international education promotion initiatives – they should not be overshadowed by the larger Lower Mainland providers.

- Second, regional school districts and post-secondary institutions need access to financial assistance (similar to that now provided by the Ontario Government) which will provide travel and materials development support for promotion and marketing campaigns and seed money for project development.

- Third, government should consider sponsoring group visits by the presidents of small colleges, UNBC, senior officials of the Ministry of Advanced Education, and by non-metropolitan school districts and officials of the Ministry of Education to key international education markets. In order to maximize the returns to the expenditure of government resources, these visits would need to be preceded by rigorous market analysis to ensure that they would be likely to bear fruit.

- Finally, the Presidents of the province's large universities could be encouraged to take a leadership role in these marketing and promotion endeavours. The presidents of UBC, SFU, and the University of Victoria have well-established international relationships that other institutions could benefit from. By taking such a leadership role, the presidents of these institutions would be making a significant contribution to increasing the number of potential graduate students in

the province as well as having the opportunity to recruit students onto their own campuses.

Perhaps most importantly, the kind of supports discussed above need to be maintained over a number of years in order for the smaller institutions to develop the personal, institutional and agent networks necessary for long-term sustainability of their recruitment efforts. At some point in the future, many of these public providers would likely be generating sufficient revenues to allow for discontinuance of the travel and marketing support. Of course, from the beginning, data should be gathered which would allow for the efficacy of these support initiatives to be assessed.

What is not being suggested here, however, are that the efforts to expand international education activity in the province should be focused solely on the issue of regional economic development. On the contrary, any coordinated approach to marketing and promotion must focus on growing the number of international students studying in BC as a whole and developing the public and private sector markets for education products and services overseas. By increasing British Columbia's visibility in the international marketplace for education, BCIT and Vancouver and Victoria's schools, colleges, and universities and private sector providers would benefit as much as the province's regional providers. Moreover, metropolitan institutions would have a much larger cohort of high school graduates, transfer students, and undergraduates to draw upon in order to populate their own programs. Having said this, regional institutions need to be explicitly promoted in order to encourage the flow of international students to the province's regions.

Immigration Processes

The education sector's recruitment activities are often adversely affected by visa denial or slow processing of student visa applications by Citizenship and Immigration Canada (CIC). The Federal Government must find ways of speeding up the visa approvals process. Australian student visas can be processed in under a week, for example, while Canada student visa approval can take up to six months depending upon the country of origin. Such bottlenecks mean that the overseas agents (upon whom most education providers in British Columbia rely for much of their recruitment) tend not to promote our educational institutions and focus on universities and colleges in more visa-friendly nations. As Martha Piper, President of UBC, observes: "The visa and immigration system needs adjusting so that we can be much more nimble in the marketplace. Otherwise we will not be able to compete with the more aggressive players around the world."

Dr. Piper's observation is especially apposite with respect to the efforts of the province's universities to attract the best and brightest graduate students and faculty, efforts that are being paralyzed by Canada's visa processing system and its regulations. Our universities are faced with a growing shortage of faculty and researchers due to faculty retirements. At the same time, in many key disciplines, our nation's university system is not producing a sufficient number of graduate students interested in applying for the vacant positions. As a consequence, the province's universities have been forced to recruit well-

qualified and able faculty and graduate students in a fiercely competitive international marketplace. However, their attempts to recruit the best and the brightest candidates are frustrated by restrictive visa regulations and slow processing of applications. In contrast, our competitors are able to process visas quickly and most offer graduate students the possibility of remaining in the host country to live and work after graduation. In addition, when our universities are able to make an offer to a potential faculty or graduate student from overseas, the offer is often rejected because of visa restrictions placed upon the ability of the candidate's spouse to work in the province.

Nonetheless, there has been a modest improvement made in one regulatory area. Until recently, overseas students in British Columbia wanting to work to help cover their expenses and to gain work experience were restricted to working on campus. Fortunately, this restriction has now been lifted. However, graduates wishing to stay in the province are restricted to working outside of the Lower Mainland, and then only for a maximum of two years at which time they are required to leave the country. It is suggested that the province work with the Federal Government to address these issues so that overseas students, at a minimum, can have the ability to work anywhere in the province for two or three years after graduation.

Notwithstanding the above suggestion, efforts are needed to bring about more fundamental changes in the visa system that would facilitate the upgrading of student visa to landed immigrant status upon graduation. With impending skills shortages in the province, particularly in the skilled trades and technical disciplines, it makes sense that overseas students should be able to readily convert to landed immigrant status once they have successfully completed their studies. These graduates speak English, or have learned English while here, have exposure to Canadian culture and values, and have shown a commitment to the province. It makes little sense to force them to return home or to move to another country if they would prefer to remain in Canada. The Provincial Government should recommend to the Federal Government that BC operates a pilot project – modelled on Australia's approach which uses its pool of international students as a source of skilled immigrants – aimed at facilitating the transition from student visa to landed immigrant status. Such a pilot project would also have the benefit of making BC more attractive to overseas students intent on finding vocational, technical, undergraduate, or graduate training and education.

Limited Opportunity for BC Students to Study Abroad

In the knowledge-based global economy, education and training play a key role in ensuring economic development. By increasing participation in post-secondary education and concentrating on training and re-training the existing workforce, both government and the private sector improve regional and corporate competitiveness. As a consequence, economic and community development is enhanced, resulting in increased prosperity for the citizens of the province. But for BC's economy to be able to continue to prosper in the global marketplace, a new set of competencies are required. These include:

- Foreign language skills
- Culturally sensitive business etiquette
- Domestic and global perspectives on the economy and business
- Intercultural competence
- Resiliency/coping skills
- Openness to innovative solutions
- Management skills
- Technological sophistication

Currently, many BC businesses are encouraging staff to take overseas appointments in order to develop these competencies and, therefore, to build the long-term competitiveness of the enterprise. In the province's education system, many students are developing these competencies as school districts and institutions internationalize their curricula. Also, students are developing a more global perspective as they come in contact with the increasing number of international students being attracted to study in British Columbia. However, these developments are not sufficient by themselves.

While many universities and colleges in BC are finding ways to provide some financial support for student mobility initiatives – often financed by their international education operations – there is no question that the number of BC students studying and working overseas needs to be boosted considerably. Indeed, less than one percent of domestic post-secondary students in BC have studied in another country – and the majority of those have studied in the United States. To address this shortfall, the Government of British Columbia has proposed the One World Scholarship Fund to provide study abroad scholarships and has recently announced a joint initiative with the Chinese Ministry of Education which will see scholarships provided to BC students to study at Chinese universities.

Nevertheless, without a significant boost in the number of BC students studying in Asia, Europe, Central and South America, and Africa, it is certain that in the coming decades BC's workforce will not have the requisite skills to succeed in an increasingly globalized economy. It is strongly suggested, therefore, that significant numbers of students from British Columbia should be encouraged to study and/or take up cooperative work placements overseas. Within this context, a scholarship program that assists BC students to meet the additional travel and medical expenses associated with overseas study or work placements should be a key part of any economic strategy that aims to deepen and strengthen the province's place in the global economy. It is suggested that the Provincial Government's One World Scholarship Fund should receive sufficient funding to permit a significant number of students each year to study or take work placements overseas.

Competition from Other Countries and Provinces

British Columbia is far from being the only jurisdiction in the world actively seeking to bolster its international education sector by attracting top quality students. Leading competitors include Australia, the UK, the European Union, and the US in the international arena and, domestically, Ontario.

PROGRESS

Most of our competitors have had international education promotional programs in the global market for many years. In some cases, these programs are supported by aggressive government sponsored initiatives. For example, Australia recently invested $21 million (AUD) in marketing education internationally and the United Kingdom has launched a multi-million pound sterling (£) marketing campaign. And, in the past few years, the New Zealand government has adopted a strategic approach to developing the sector under the banner: 'Export Education in New Zealand.' Moreover, the European countries are making progress in harmonizing their diverse education system to garner a share of the international education market. In particular, European Union nations are expanding the delivery of degree programs in English, both to attract more overseas students and to provide domestic students with English language skills.

A recent study commissioned by the Australian Government found that Canada's positioning as a desirable destination for international education and training is less clear than the UK, USA, or Australia and that the most distinctive feature about an education in Canada is that it is not distinctive at all! This strongly suggests that there is a definite need for British Columbia to address the competition by creating a clear and distinct brand image within a Canadian context. Without this, BC will not be able to compete in an increasingly crowded market.

In Canada, several provinces have developed international education strategies in order to maximize their share of the international education market. Alberta, for example, has recently launched its 'International Education Strategy.' And, about five years ago, Quebec launched a pilot program investing significant resources in a variety of initiatives designed to promote its educational expertise.

Box 5:

Alberta's International Education Strategy

The Alberta Government's international education strategy is designed to:

- Expand second language skills and build global competencies through increasing second language training in the K-16 system and supporting study abroad and exchange programs.
- Ensure that overseas students get recognition for their existing credentials.
- Work with Citizenship and Immigration Canada to facilitate the quick processing of student visa applications.
- Facilitate the development of accredited schools overseas designed to deliver the Alberta high school credential.
- Recognize the importance of the education export industry in developing knowledge about Alberta and its industries.
- Provide resources through its various ministries in support of the industry.

Quebec's multi-million program supported the development of promotional materials, the province's involvement in trade shows and education fairs, and general student recruitment efforts. In addition, the program supported Quebec's involvement in

international forums and organizations connected with education and training, as well as supporting delegations to and from overseas markets. The pilot project also provided bursaries for Quebec students who chose to study abroad. Recently, this pilot project was given on-going budget status and now receives $10 million annually from the Quebec Government.

Ontario is the province with the largest number of international students. In 2003, just under 57,000 students with study visas were registered in Ontario's schools, colleges and universities. This represented 37.5 percent of the national total of 151,450 visa students in that year. In recognition of the important economic impact that international education has on communities large and small, the Government of Ontario recently contracted with the Canadian Education Centre Network (CECN) to develop an 'Ontario Pavilion' for use at education trade fairs across the world. This initiative will develop a distinct image and commanding presence for Ontario at these critical marketing and promotion events. Participating education providers will be clustered together in a shared space in the various venues. Furthermore, the Ontario Government has identified India as a major developing market for the export of educational services. As part of this market development initiative, the province is underwriting the attendance of public institutions at CECN trade fairs and other promotional events in India. As a consequence, the number of Ontario institutions attending marketing events in India has more than doubled to 45, with many of the new additions being from small and medium sized centres outside of metropolitan Toronto.

At this point, a word of caution is in order: it should be remembered that trade sectors such as education, with an emphasis on personal service, are particularly vulnerable to such events as global disease outbreaks like SARS, war in the Middle East, security concerns arising from terrorism, and currency exchange fluctuations. These factors and others like them will cause interruption in any strategy to sell services like education. Such interruptions should be expected and we should be prepared for delays and setbacks.

Market Responsiveness

Education providers and the Provincial Government would be advised to work together to find ways of overcoming the many procedural and structural impediments that get in the way of effective and nimble responses to market developments. Such impediments may appear small by themselves but collectively they create a significant drag on the province's ability to compete in the international education arena. Two examples will serve to illustrate this situation, one from the post-secondary arena and one faced by those organizations promoting BC's secondary graduation program in the international marketplace.

The Minister of Advanced Education has appointed the Degree Quality Assessment Board to review, among other things, degree proposals from public and private sector institutions and to recommend to the Minister approval or rejection of each proposal. The process, which involves a 30-day period for public input, takes approximately six months

to complete. In the vast majority of cases, a review process of six months does not present an institution with any difficulties. However, when an institution is negotiating with an overseas client around the delivery of a new or customized degree program, a six month wait for approval is often problematic and may well lead to the loss of the service contract. To resolve this problem, yet at the same time retain the strong quality assurance component of the existing process, the Minister may wish to consider permitting public and private sector universities to opt for an alternate post-implementation degree audit process. Restricted to approved universities, provisional approval could be given to degree programs provided that the applicant university submitted to annual degree quality audits during the first four years of the degree program's operation. Universities applying for the audit scheme would face removal of the provisional approval at any time during the audit period if quality standards were deemed not to have been met. Universities would be required to have a plan in place which would stipulate how students would transfer to other institutions for degree completion purposes should the provisional approval be removed at any time. Such a post-implementation audit process would enable universities to respond quickly to overseas opportunities while at the same time ensuring protection of BC's reputation as a source of high quality undergraduate and graduate education and training.

The second example of "market drag" can be found in the name of British Columbia's secondary school graduation certificate. While the term 'Dogwood Certificate' is known and understood throughout the province it has no meaning whatsoever in the international marketplace. As the Ministry of Education attempts to expand the credential's reach into China and the Middle East a new, more descriptive name for the certificate would be useful. In addition, school districts seeking to attract overseas students into their high school programs would find the certificate easier to promote if it were renamed. One useful suggestion has been made to rename the certificate the 'Western Canadian Secondary Graduation Certificate' or the 'Canadian Secondary Graduation Certificate.' The renamed certificate could be offered both domestically and internationally in conjunction with the province of Alberta. Such an approach would enable the certificate to coattail on the international recognition of the 'Canada Brand' and would further the efforts of the governments of both Alberta and British Columbia to broaden their cooperative efforts.

Low Profile in Marketplace

Canada has some visibility in the arena of international education but, as a jurisdiction, British Columbia has no presence in the marketplace. Individual public and private sector providers promote themselves in a largely uncoordinated way through such things as personal contacts, networks of overseas agents, relationships with overseas institutions, websites, and education trade fairs. Some modest coordination occurs from time to time, centred around specific events under the auspices of the various sector organizations noted earlier. Unfortunately, these piecemeal and uncoordinated events simply exacerbate the province's confused and confusing image to the outside world and do nothing to address the paucity of the jurisdiction's consumer recognition as a provider of education.

Domestic Public Perception

Both public sector education providers and the Provincial Government are often challenged by residents who perceive that international students are displacing domestic students. There is no evidence, however, that this is occurring. On the contrary, institutions use the revenues generated through international activities to create new seats and to provide enhanced facilities and services for domestic students.

To counter these negative perceptions, it is suggested that the Provincial Government, in partnership with the public education providers, develop an information program that stresses the general economic, social, and cultural benefits of international education and highlights the direct benefits that flow to domestic students and local communities as a result of this entrepreneurial activity. To assist in this task, the Provincial Government will need a variety of demographic and programmatic data on overseas students and will have to develop a more comprehensive understanding of their impact on provincial and local economies. As part of this data gathering, and to reinforce the impact international education has on the Provincial economy, it is suggested that Government start recognizing international students as part of its capacity measurements in the K-12 and post-secondary systems. The Provincial Government may also wish to consider working with public institutions to showcase specific examples of benefits flowing to domestic students and communities.

Lack of Cohesiveness

As indicated earlier, BC's international education sector is characterized by a laissez-faire approach to product and service development and marketing and promotion. The lack of a cohesive approach results in duplicated effort, needless and destructive competition, marketplace confusion, and the lack of development of any distinctive brand image for BC in the international education and training market. To date, however, this situation has not prevented the sector as a whole from thriving. Nevertheless, given an increasingly complex and competitive international education environment, the sector will not be able to reach its full potential without some degree of coordination and collaboration among the public and private sector providers. Indeed, as Dr. Randal Martin, Director of SFU International suggests: "Nowadays, we have to work harder and more collegially just to stay where we are."

Increased levels of coordination between education organizations could lead, for example to the development of new products and services. Currently, many post-secondary institutions and the Ministry of Education are accrediting matriculation and secondary graduation programs offered by private providers in China, Hong Kong, and elsewhere. These accreditation services tend to generate little or no net revenue given that the accreditation fees tend to be used to offset the costs of inspection visits by BC personnel. By closely linking these overseas secondary graduation programs to specific public or private post-secondary institutions a guaranteed flow of students could result. As a result, BC would receive a better rate of return on these accreditation activities than is currently the case.

Box 6:

Education Export Sector Organizations

There is a plethora of organizations in the education sector that, in various ways, are involved British Columbia's education export industry. This range of organizations is emblematic of one of the major challenges facing the BC sector – it has no means of speaking as one voice to the Provincial or Federal Governments, nor does the sector have a coherent and coordinated presence in the marketplace. Most of BC's public and private sector providers are involved in at least one of the following organizations that, to a greater or lesser extent, provide support or advocacy for international education:

- Association of Community Colleges of Canada
- Association of Universities and Colleges of Canada
- Association de l'Industrie de la Langue/Language Industry Association
- British Columbia Centre for International Education
- British Columbia Career Colleges Association
- Canadian Association of Private Language Schools
- Canadian Language Council
- Canadian Education Centre Network
- Canadian Bureau for International Education
- Canadian Education Trade Alliance
- International Public School Education Association
- Universitas 21

One suggestion that has received considerable support is that the Provincial Government could consider establishing a promotion and marketing board for the sector, possibly modelled on Tourism BC, bringing together both public and private providers. In cooperation with the relevant ministries, the organization could develop market information and coordinate efforts to diversify the international student body so as to provide a cushion against the effects of social, political and economic upheavals in markets where the sector is overexposed. In addition, the new organization could work with its members to find ways of promoting BC through a coordinated campaign aimed at alumni. Such an organization could also usefully work with its members to promote the university transfer system to potential international students. The proposed organization could also sponsor the development of a strong BC presence at education trade fairs (similar to the Ontario Pavilion concept mentioned earlier). However, in providing funding for the coordinating vehicle the Government should be careful not to stifle the entrepreneurial behaviour of the various public and private sector providers.

Need for a BC Brand within a Canadian Context

One of the primary requirements if BC is to pursue the expansion of international education is the need to create some consistency around 'branding.' It is not cost effective for the many educational institutions to be marketing and pursuing international business with each using only their individual facility or institutional brands. There would be greater success if all international education efforts could be pursued under a common umbrella brand or image. And, if this brand could be extended to include other export

trade activity, so much the better. For example, education could well be rolled into the Ministry of Economic Development's efforts to use the 2010 Olympics to promote business and investment in the province. In addition, the Ministry might consider including education as an export sector in its broader promotional efforts connected with the Provincial Government's Asia-Pacific Gateway Strategy.

Branding British Columbia is not without its challenges, however. It is generally conceded that while Canada and Vancouver are well-recognized entities internationally, British Columbia is not. Using Vancouver as a brand would not appropriately reflect the regional diversity of the province. Using, or at least referring to, Canada has some advantages but it should be in the context of highlighting British Columbia. The Government could take the lead in identifying some brand identifiers or phrases, with consistent use of font, logos and script, which could be promoted for use by all public sector institutions and, possibly, by the private sector.

In part, the decision as to which jurisdictional name to use will depend to some extent on whether the marketing effort will be a Canadian one or a Provincial one. It is generally conceded that coordinating efforts provincially would be much more effective and timely than trying to spearhead a national effort. This is simply due to the difficulties associated with attempting to gain consensus among all the jurisdictions and stakeholders across the country. Despite this caveat, it should be remembered that Canada's national brand image is particularly strong and therefore needs to be integrated as much as possible into a 'BC Brand'. A useful reminder of the need for the integration of the Canada brand into any BC Brand came in August 2005, when the Anholt-GMI Nation Brands Index placed Canada just behind Australia in terms of international brand power. The study noted that Canada is viewed as being a better place to live, work and invest than the UK or the US.

In addition to the development of a distinct 'BC Brand' which can encompass all aspects of the province's trade activity – and not only education – the Government needs to ensure that ministers and senior government officials who travel to developing markets both reinforce the BC brand and assist in market development for all sectors. As part of this initiative, the Ministry of Economic Development, in close cooperation with the Ministries of Education and Advanced Education and private sector associations, may wish to consider providing Government representatives with briefing materials so that they will be able to present information and develop connections for trade in areas other than their specific ministerial mandate. The imprimatur of the Provincial Government is critical in some markets, especially for social sectors like education. Therefore, Government might consider sponsoring marketing initiatives involving senior ministry officials, the leaders of public education organizations, and the CEOs of private sector providers. The power of such visits in a government-to-government context can be seen in the signing of an MOU on cooperation with China, which was recently achieved by the Premier. Also, at some point in the future, the Government may wish to consider opening Trade and Education Centres in key market areas to capitalize upon and expand awareness of the 'BC Brand.'

Current Level of Provincial Government Involvement in the Sector

In British Columbia, the Ministry of Advanced Education currently has an Assistant Deputy Minister responsible for maintaining a watching brief on the international education sector. Two new positions have been created to provide support to the sector through such activities as hosting foreign delegations, assisting with marketing, and acting as a conduit between the Ministry and the education providers. In the arena of K-12 provision, the Ministry of Education maintains enrolment data on international education students and has some staff focusing on support to school districts that offer educational experience for overseas students. However, unlike many provinces, the Government of British Columbia's website has no pages designed specifically for prospective overseas students. This should be rectified.

> "Government must play a role in marketing and promotion in the education export sector. However, it needs to take a broad strategic approach and facilitate the activities of the various sector players. Whatever it does, it should not attempt to control or limit entrepreneurial activity. In short, the Provincial Government needs to harness the power of the education export sector – but it must not put the sector in a harness."
> **Don Avision, President, The University Presidents' Council.**

This paper has shown that, given both the size of international education in the province and its strategic role in the context of a global economy, it would be advisable for the Provincial Government to become more engaged in supporting the sector. An important first step is to gather data that is capable of informing policy development and supporting promotional activities. There is no question that over the medium- to long-term there is a need for enrolment, program and economic data in order to develop a clear picture of the impact of the international education sector on the province's economy and to have sufficient background to drive policy development. And, within the context of policy development, there also needs to be a forum through which public and private sector education providers can have input – perhaps through the proposed representative organization modelled on Tourism BC.

The lead responsibility for the Government's promotion and marketing efforts in the international education sector should be assigned to the Ministry of Economic Development. In order to build the international education sector in the province a significant increase in government-to-government interaction at the ministerial and senior government official level is required and the Ministry of Economic Development is best placed to provide the necessary coordination of effort in this particular arena. Moreover, it bears repeating that both the export of education products and services and efforts to expand the number of students studying in the province need to be incorporated into the Provincial Government's overall market and trade development initiatives; obviously, this too is the responsibility of the Ministry of Economic Development. Nevertheless, to ensure the effective and efficient development and roll out of international education marketing and promotional strategies and events, it is vital that in all phases of its activities the Ministry work in close cooperation with the Ministries of Education and Advanced Education.

Finally, a note of caution – government ministries charged with developing policy affecting international education need to ask themselves: "What role can we play in facilitating the entrepreneurial activity of the public and private sector providers while, at the same time, protecting and developing BC's reputation as a destination for high quality education and training?" To date, British Columbia's success in the international education field has been the result of the laudable entrepreneurial initiative displayed by individuals and organizations in both the public and private sectors operating in a context of limited government policy oversight. As government becomes more involved in the international education sector it must be careful not to unintentionally fetter or constrain the entrepreneurial spirit of the various players in the field – particularly those in the public sector – through the development of policies or programs.

VII. POLICY AND PROGRAM SUGGESTIONS

1) Incorporate the international education sector into the Government's integrated trade development initiatives and ensure that the sector can benefit from the development of the 'BC Brand.'

a) Assign lead responsibility for government initiatives in the marketing and promotion of international education to the Ministry of Economic Development and ensure that the Ministries of Education and Advanced Education play integral roles in the planning and implementation of those initiatives.
b) Collect enrolment, program and economic data associated with international education activities and use the data to inform policy development.
c) Utilize the above data to inform the general public of the strong positive benefits which accrue to having a vibrant international education component in the public education system and to highlight the important contribution made by the private sector education sector to the province's economy.
d) Consider working with the public institutions to showcase specific examples of benefits flowing to domestic students and communities from international education activities.
e) The Ministry of Advanced Education should consider requiring public institutions to report international students as a distinct part of their annual capacity reports.
f) Develop export-briefing packages for all ministries that include international education as a significant element.
g) Increase international government-to-government interaction at the ministerial and senior government official level, targeted primarily at emerging and potential markets for BC's education products and services.
h) Consider establishing BC Trade and Education Offices in China and India, and other emerging markets.
i) Emphasize BC's social capital advantages in tandem with economic advantages in all economic development and international education promotional tools.
j) Develop a 'BC Brand' that builds on both Canada's national brand and the upcoming Olympics.

k) In cooperation with business, industry and the education sector, develop brand identifiers or phrases, with consistent use of font, logos and script, which can be used by international education providers in their marketing and promotional efforts.
l) Develop a strong BC presence at education trade fairs (similar to the 'Ontario Pavilion' concept).
m) Develop web pages on the Government's website which target prospective international students.

2) Consider creating an organization, perhaps modelled on Tourism BC, which can deliver effective coordination and support to the public and private sector international education providers.

a) In cooperation with the relevant ministries, the organization should develop market information and coordinate efforts to expand and diversify the number of international students.
b) The organization should work with its members to find ways of promoting BC through a coordinated campaign aimed at alumni.
c) The organization should work with its members to promote the university transfer system and distance delivery programs to potential international students.
d) BC's post-secondary institutions should consider developing distance delivery packages for overseas markets building on the capabilities of the BC Campus system.
e) To ensure a better rate of return to the BC economy, the organization should assist education organizations to link overseas secondary graduation programs to specific public or private post-secondary institutions, thereby helping ensure a guaranteed flow of students from these overseas projects.

3) Expand study abroad opportunities in order to develop a more globally literate workforce in the province.

a) Provide sufficient resources to the One World Scholarship Fund to permit a significant number of students to study or take up cooperative education work placements abroad on an annual basis.
b) Set aside a portion of the One World Scholarship Fund to provide financial assistance to overseas students who could not normally afford to study in British Columbia.
c) Work with the public and private education systems to promote the importance of study abroad for personal and economic growth.

4) **Support the international education sector's role in regional economic development.**

   a) Develop a government funded marketing and promotion assistance program to help interior, northern, and coastal educational institutions expand their international education enrolments.
   b) Gather data that can be used to assess the efficacy of any marketing and promotion assistance program.
   c) Ensure that smaller, non-metropolitan, institutions are well represented at any marketing and promotional events overseas.
   d) Encourage public institutions to develop year-round language tourism packages in cooperation with the private sector.
   e) Sponsor group visits by the presidents of small colleges and universities and senior officials of the Ministry of Advanced Education, and by non-metropolitan school districts and officials of the Ministry of Education, to key international education markets.
   f) Ensure that the above visits are based upon sound market information so as to maximize returns to the expenditure of time and financial resources.
   g) Encourage the presidents of the province's larger universities to take a leadership role in promoting and marketing the post-secondary system overseas.
   h) Regional colleges and universities should be encouraged to form regional consortia aimed at developing and marketing innovative integrated program packages to overseas students.
   i) Assist non-metropolitan education organizations to develop partnerships with overseas institutions that focus on first and second year university courses and involve both face-to-face instruction overseas and distance delivery.

5) **As a matter of high priority, address quality assurance concerns in the ESL training arena by re-regulating private sector schools and by establishing minimum teaching qualifications for both public and private sector providers.**

   a) Re-regulate the private ESL sector so that the negative impacts on market perceptions of recent business failures can be mitigated.
   b) Establish minimum qualification levels for ESL instruction in the public and private sectors.
   c) Consider establishing an Education Quality Assurance (EQA) designation, modelled on the wine industry's VQA system, that will assure potential international students that they will be receiving high quality education and pastoral care should they decide to enrol in EQA designated educational organizations.

6) **Address existing visa processing challenges with the Federal Government and secure a pilot project that will assist the province in meeting the pending shortage of skilled workers.**

a) The Provincial Government should encourage the Federal Government to speed up student visa approvals and permit spouses of graduate students and faculty from overseas to work in the province without restriction.
b) The Federal Government should be urged to permit overseas students to work anywhere in the province after graduation for a period of up to three years.
c) The Provincial Government should lobby the Federal Government for permission to operate a pilot project designed to smooth the transition from student visa to landed immigrant status for international students who successfully graduate from the province's post-secondary and skills training programs.
d) Once the pilot project is in place, expand the number of international students in trades and technical studies through a coordinated effort involving colleges, the university colleges, BCIT, TRU, and the Industry Training Authority. This effort could usefully be backed up by a modest scholarship program supported by the Provincial Government.

7) Minimize policy and procedure impediments to the entrepreneurial activity of both public and private sector international education providers.

a) Consider adjusting the current degree approval process to allow for post-implementation audits so that universities can provide more timely responses to international clients.
b) In order to improve marketing and promotion efforts, rename BC's secondary graduation certificate. Consider a joint initiative with Alberta aimed at establishing the 'Western Canadian Secondary Graduation Certificate' or the 'Canadian Secondary Graduation Certificate' to replace the Dogwood Certificate.
c) Ensure that the Government's marketing and promotion efforts in international education do not constrain the entrepreneurial activities of either the public or private education sectors.

Appendix A References

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Appendix B List of Interviews

Mr. Don Avison
President
The University Presidents' Council
Victoria, BC

Dr. Roger Barnsley
President, Thompson Rivers University
Kamloops, BC

Mr. Rodney Briggs
President, Canadian Education Centre Network
Vancouver, BC

Mr. Harry Brown
President, International Public School Education Association
and Director of International Programs, Sooke School District
Victoria BC

Dr. Emery Dosdall
Deputy Minister,
BC Ministry of Education
Victoria, BC

Dr. Michael A. Goldberg
Chief Academic Officer, Universitas 21 Global
Singapore

Mr. Soren Harbel
Assistant Deputy Minister
BC Ministry of Economic Development
Vancouver, BC

Ms. Donna Hooker
President, British Columbia Centre for International Education
and Director of International Education, Vancouver Community College
Vancouver, BC

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President, University of Northern British Columbia
Prince George, BC

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Victoria, BC

Dr. Greg Lee
President, Capilano College
North Vancouver, BC

Ms. Monica Lust
President, British Columbia Career Colleges Association
Vancouver, BC

Ms. Mary Mahon-Jones
CEO, Council of Tourism Associations of British Columbia
Vancouver, BC

Dr. Randal Martin
Director, SFU International, Simon Fraser University
Burnaby, BC

Dr. Kenneth McGillivray
Acting Associate Vice President International, University of British Columbia
Vancouver, BC

Mr. Peter Owen
Lead Director, Governance Department
BC Ministry of Education
Victoria, BC

Dr. Martha Piper
President, University of British Columbia
Vancouver, BC

Ms. Valerie A. Richmond (and Ms. Sharon Curl)
President, Canadian Association of Private Language Schools
and Director, Aspect Vancouver
Vancouver, BC

Dr. Nick Rubidge
President, College of the Rockies
Cranbrook, BC

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Dr. Rick Skinner
President, Royal Roads University
Victoria, BC

Dr. David Strong (and Mr. Roger Wheelock)
President, University Canada West
Victoria, BC

Ms. Mary Anne Tierney
Associate Director, International Education, College of New Caledonia
Prince George, BC

Dr. David Thomas
Vice President Academic, Malaspina University College
Nanaimo, BC

Mr. Tom Vincent
Assistant Deputy Minister, Student and Strategic Services Division,
BC Ministry of Advanced Education
Victoria, BC

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Thrifty Foods

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Driediger Investments Ltd.

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Yahoo! Inc.

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Mr. Harry McWatters
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Sumac Ridge Estate Winery Ltd.

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President & Vice-Chancellor
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Concert Properties Ltd.

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Mr. Jim Shepherd
President & CEO
Canfor Corporation

Mr. Ken Shields
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Raymond James Ltd.

Mr. Mark Shuparski
President
Pacific Capital Investments

Mr. Brian Surerus
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Surerus Pipeline Inc.

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Mr. Doug Whitehead
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University of British Columbia

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December 2005

BC **PROGRESS** BOARD

THE ROLE OF INTERNATIONAL EDUCATION: EXPANDING STUDENT OPPORTUNITY AND ECONOMIC DEVELOPMENT IN BRITISH COLUMBIA

SUMMARY OF POLICY AND PROGRAM SUGGESTIONS

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